



INTERDEPARTMENTAL MEMORANDUM

SUBJECT: Establishing Performance Data in BFMS for FY 04

DATE: April 2, 2004

TO: All Departments and Agencies

FROM: Keith E. Todd, State Budget Officer Bureau of the Budget

The FY 06-07 budget is required to be submitted in a performance budget format both with respect to the budget document and the budget bills. The budget document and budget bills must also include actual performance data for FY 04, and estimated performance data for FY 05. The Budget and Financial Management System (BFMS) will use the performance data that currently exists in the biennial area of the system as the basis of the FY 05 estimates. Departments and agencies will need to establish actual performance data in the annual area for FY 04.

Instructions have been provided in Attachment A for establishing actual performance data in BFMS for FY 04. Departments and agencies not able to enter this information in the system by **June 30, 2004**, or that have questions about the instructions, should contact their Budget Analyst/Examiner.

Departments and agencies that do not have access to BFMS should provide this information to their Budget Analyst/Examiner in an electronic format by **June 29, 2004**. After the information has been received by this office and processed, we will send a set of computer generated reports reflecting the data. Review these materials carefully to ensure that the information is identical to what you submitted.

KET/djl
Attachment:

cc: Commissioner Wyke
Budget Analysts/Examiner

Attachment A

Open Performance Budget - Actual

Program Strategy	Description	Assigned Reporting Level
WOR00-A-01-0183	Administer a statewide workers' compensation program to serve the employers and employees of Maine	0183
WOR00-B-01-0195	The Board will administer a statewide vocational rehabilitation program by overseeing, approving and ordering vocational	0195
WOR00-C-01-0751	Administer a statewide workers' compensation program to serve the employers and employees of Maine.	0751

Navigation Path: Log On ⇒ Annual (button) ⇒ Performance Measure Actual (radio button) ⇒ Open Performance Budget Actual

Purpose: The Performance Measure (Actual) windows are accessed to capture actual performance data for comparison to expected levels of performance. The *Open Performance Budget Actual* window provides access to the *Performance Budget Actual - Detail* window for the selected Program Strategy.

Completing the Window:

NOTE

When the window is accessed, a row will display for each Program Strategy for the selected Umbrella.

1. Click on the row for the desired **Program Strategy** and click the **Select** button to access the *Performance Budget Actual – Detail* window for the selected Program Strategy.

Click **Exit** to exit the window and return to the prior open window.

Performance Budget Actual - Detail

Measure	Description	Total 1st Quarter	Total 2nd Quarter	Total 3rd Quarter	Total 4th Quarter	FY 2004 Total
0001	Percentage of claims through trou	21.5%	19.0%	0.0%	0.0%	40.5
0002	Percentage of claims through mec	5.0%	10.0%	0.0%	0.0%	15.0

Navigation Path: Log On ⇒ Annual (button) ⇒ Performance Measure Actual (radio button) ⇒ Open Performance Budget Actual⇒*Select a Program Strategy* Select (button)⇒Performance Budget Actual - Detail

Purpose: Allows actual performance data to be viewed at the performance measure object level, and provides access to the **Performance Budget Actual Change** window.

Completing the Window:

NOTE

When the window is accessed, a row will display for each Performance Measure. The data for the measure will be based on approved Financial Order and Department and Agency Revision information.

1. To view or add/modify detailed changes to the data for the selected Program Strategy, click the **Change** button.

Click **Exit** to exit the window and return to the prior open window.

Performance Budget Actual - Change

BFMS - bfmstest.state.me.us

File Administration Reports Window Help

Performance Budget Change - Actual

Year 2004

Umbrella WOR00 WORKERS' COMPENSATION BOARD

Performance Value WOR00-A-01-0183

Agency Ref	Measure	Description	Total 1st Quarter	Total 2nd Quarter	Total 3rd Quarter	Total 4th Quarter
0930	0001	Percentage of claims through trouble	21.5%	0.0%	0.0%	
1231	0001	Percentage of claims through trouble	0.0%	19.0%	0.0%	
0930	0002	Percentage of claims through media	5.0%	0.0%	0.0%	
1231	0002	Percentage of claims through media	0.0%	10.0%	0.0%	

Sort Order. (Enter 1 in primary sort, 2 in secondary sort.)

Update Insert Delete Undo Sort Explanations Exit

Window: Performance Budget Change - Actual / Edit Field: Agency Ref

Navigation Path: Log On ⇒ Annual (button) ⇒ Performance Measure Actual (radio button) ⇒ Open Performance Budget Actual⇒*Select a Program Strategy* Select (button)⇒Performance Budget Actual - Detail⇒ Change (button)⇒Performance Budget Actual – Change

Purpose: Used to establish/modify actual performance data for the selected Program Strategy, allowing for a comparison to performance targets for the year.

Completing the Window:

1. Click **Insert** to add a new record, or click on an existing record to edit it.
2. Enter a unique **Agency Ref** value. The value entered may be up to 10 characters in length and may be any combination of alpha and numeric values. The **Agency Ref** values allows departments and agencies to insert multiple records for the same performance measure object.
3. Select the appropriate object from the **Measure** drop down window. The desired object may be entered as long as 1) it is valid, and 2) all four characters are entered. Once selected, the **Description** for the selected measure will display. To view the full description, select the drop down arrow for the measure.

4. Using the appropriate column(s), enter the incremental amount(s) necessary to reflect cumulative achieved performance levels for the measure when it is viewed at the object level. The value will display as a number, percentage or dollar amount, depending on the measure type that was assigned to the measure in the *Performance Measures* window.

NOTE

By default, actual performance data may be entered by quarter. To establish data by month for one or more Program Strategies, access the *Performance Budget Values* window (Administration⇒Administration⇒Performance Budgeting⇒Performance Budget Values) and change the **Summary Level** for from quarterly to monthly. A column will display for each month in the *Performance Budget Change Actual* window.

5. Click the **Explanation** button to access the *Performance Budget Change Explanation – Actual* window and provide additional information for the adjustment (e.g. Factors that influenced performance related to the change).
6. Data may be resorted in the window by entering a numeric value in one of the boxes reflected below the **Agency Ref** and **Measure** columns and clicking the **Sort** button. By default, data will be sorted by **Measure** object.

When finished with the record, click **Update** to save. **Undo** will undo any changes made since the last update, while **Delete/Update** will permanently delete the selected record. When a change record is deleted, the **Explanation** associated with the record will also be deleted.

Click **Exit** to exit the window and return to the prior open window.

Performance Budget Actual – Change Explanation

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File Administration Reports Window Help

Performance Budget Actual - Change Explanation

Year 2004

Umbrella WOR00 WORKERS' COMPENSATION BOARD

Performance Value WOR00-A-01-0183

Agency Ref	Measure	Description	Explanation
0930	0001	Percentage of claims through troubleshooting in 45 days	E.g. Significant factors influencing performance for the period
1231	0001	Percentage of claims through troubleshooting in 45 days	
0930	0002	Percentage of claims through mediation in 45 days	

Update Undo Exit

Window: Performance Budget Actual - Change Explanation / Edit Field: Explanation

Navigation Path: Log On ⇒ Annual (button) ⇒ Performance Measure Actual (radio button) ⇒ Open Performance Budget Actual⇒*Select a Program Strategy* Select (button)⇒Performance Budget Actual - Detail⇒ Change (button)⇒Performance Budget Actual – Change⇒ Explanations (button)⇒Performance Budget Actual – Change Explanation

Purpose: The window is accessed to provide additional information for individual change records reflected in the *Performance Budget Actual – Change* window. (e.g. Factors that influenced recent performance). This information is not currently displayed in any report. It is information for the users reviewing the data in the window.

Completing the Window:

1. Click in the **Explanation** text editor box for the desired record and enter the appropriate information.

When finished with the record, click **Update** to save. **Undo** will reverse any changes since the last update.

Click **Exit** to exit the window and return to the prior open window.

Performance Variance Explanation

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File Administration Reports Window Help

Performance Variance Explanation

Fiscal Year: 2004 Umbrella: WOR00 - WORKERS' COMPENSATION BOARD

Program Strategy: WOR00-A-01-0183

Measure: 0001

Period	Target	Actual	Difference	Variance Explanation	Last Update
01	21.25%	21.5%	0.25%		10/02/2003 20:33:38
02	21.25%	19.0%	-2.25%	Explanation for display in the Perf. Variance Explanation report.	10/02/2003 20:33:39
03	21.25%	0.0%	-21.25%		
04	21.25%	0.0%	-21.25%		
Total	85.0%	40.5%	-44.5%		

Update Undo Print Exit

Window: Performance Variance Explanation / Edit Field: Variance Explanation

Navigation Path: Log On⇒Administration⇒Administration⇒Annual⇒Performance Variance Explanation

Purpose: The window displays planned (target) and actual performance information for the selected Program Strategy and Measure. The variance explanation that is entered in the window is displayed in the **Performance Variance Explanation** report (Report ⇒ Annual ⇒ Performance Variances).

Completing the Window:

1. Select a **Fiscal Year**, **Umbrella**, **Program Strategy** and **Measure** from the correlating drop down windows. When the measure is selected, if the summary level for the Program Strategy is 'Quarterly' in the **Performance Budget Values** window, a row will be reflected for each quarter, and a total row will be displayed for the fiscal year. If 'Monthly' was selected, a row will be reflected for each month, and a total row will be displayed for the fiscal year.
2. When a variance exists between planned (target) and actual performance, enter an explanation for the variance in the **Variance Explanation** text editor box. This information will be displayed in the **Performance Variance Explanation** report.

3. When finished with the record, click **Update** to save. **Undo** will reverse any changes since the last update.
4. To print the **Performance Variance Explanation** report for the selected measure, click the **Print** button. The report may also be printed for one or more Program Strategies and/or Measures at once through the *Performance Variances* report window (Reports ⇒ Annual ⇒ Performance Variances (radio button)).

Click **Exit** to exit the window and return to the prior open window.